

Use this form to change your membership category, join the locked section or change your contribution rate.

- Use **form 4** *Stop or restart contributions* to stop or restart contributions to your locked account.
- Use **form 5** *Voluntary contributions* to make a lump sum contribution.

Complete Part A only. Your employer will complete Part B.

PART A

Personal and contact details

Mr / Mrs / Miss / Ms / Dr / Assoc Prof / Prof	SURNAME	GIVEN NAMES
Membership number		Date of birth DD/MM/YYYY
Email		IRD number*
Work phone	Home phone	Mobile

* **Locked members only** – Inland Revenue requires us to hold IRD numbers for locked members. Note your IRD number here if you haven't provided it to us before.

Complete the relevant section(s) – Payroll will advise you of the date your changes will take effect

1. Change membership category¹

I am currently a Category A member and wish to become a Category B member.

OR

I am currently a Category B member and I wish to become a Category A member. I confirm that my employer is not contributing to another superannuation scheme on my behalf (other than a KiwiSaver scheme). I acknowledge that my employer's contribution on my behalf may be adjusted if I belong to a KiwiSaver scheme.

2. Join the locked section

I wish to apply to become a locked member. (Please make sure you have provided your IRD number above.)

I confirm that I have read and understood the terms and conditions of locked section membership set out in UniSaver's product disclosure statement. In particular, I understand that:

- if I am or become a member of a KiwiSaver scheme, any compulsory employer contributions will be paid into my employer locked account first and the balance, if any, paid into my KiwiSaver scheme and that, if I do not agree with this, compulsory employer contributions will be paid to my KiwiSaver scheme first and any compulsory employer contributions to UniSaver will be reduced accordingly
- generally I will not be permitted to access my savings in my locked accounts until the later of the date I attain New Zealand Superannuation age (currently 65) or complete 5 years of locked section, complying superannuation fund or KiwiSaver scheme membership. (The 5-year rule will change on 1 July 2019. Call the helpline for more information.)

See **section 3** for details of the minimum contribution rates applicable to each membership category.

¹ You are a **Category A member** if your employer contributes to UniSaver on your behalf and a **Category B member** if your employer does not contribute to UniSaver on your behalf. You may be eligible for KiwiSaver-style compulsory employer contributions of 3% of your salary if you are a member of the locked section of UniSaver.

3. Change contribution rate – subject to the minimum contribution rates shown below

Subject to the minimum contribution rates for my membership category, I wish to change my contribution rate as follows:

Member contributions to:

Member locked account as a % of salary (minimum 3% of salary² – multiples of 0.5% only)

PLUS

Member standard account as a % of salary (minimum of 3% of salary if not contributing to locked account² – multiples of 0.5% only)

Total member contributions as a % of salary

My signature below authorises:

- the changes shown in this form
- deductions from my salary shown in section 3 of this form, if applicable.

Signed **MEMBER**

Date **DD/MM/YYYY**

If you have any queries about completing this form, please call 0800 864 724 or email unisaver@mercerc.com.

Scan this form and email it to Payroll/HR for them to complete the employer section.

PART B

Employer to complete

Employer name

Employee's membership number

Date joined locked section **DD/MM/YYYY**

Employer contributions to employer locked account as a % of salary

Employer subsidy to KiwiSaver scheme as a % of salary

Signed **AUTHORISED OFFICER OF THE EMPLOYER**

Date **DD/MM/YYYY**

Scan and email this form to unisaver@mercerc.com

Alternatively, post the form to:

UniSaver New Zealand
c/- Mercer (N.Z.) Limited
PO Box 1849
Wellington 6140

² Your minimum contributions may increase to 4% of your salary if your employer is not contributing at least 1% of your salary. See unisaver.co.nz for more information.